

# Texas Project Delivery Framework

## Master Change Request List

As of 10/31/2008

Change Request ID	Long Description	Impacted Framework Version	Originator Agency	Originator Name	Impact Area	Impact Level	CAB Review Date	CAB Impact	CAB Priority	CAB Action	CAB 'Defer Until' Date	DIR Approval Date	DIR Action	DIR 'Defer Until' Date	Implemented Framework Version
47	The business problem is the inability to copy the financial information from the Business Case Workbook into the Business Case Word document because the Workbook is password protected. All of the values must be re-keyed. The instructions require copying specific information from the Business Case Workbook into the Business Case. The protection on the Workbook does not allow for selection of the information to be copied and therefore, data must be re-keyed which is inefficient. The desired outcome is to provide the ability to copy the financial information.	2.0	Office of the Attorney General	Scott McKenzie	Business Case	Moderate									
46	The desired outcome is to correct inconsistencies in requirements for the Framework Contract Amendment and Change Order Approval deliverable within Framework guidance and QAT guidance. QAT Policy and Procedures Manual states: Agencies use internal methods to obtain agency head approval of amendment or change orders that change the monetary value of the contract by more than 10% of initial contract amount or significantly changes contract completion date, including use of the Contract Amendment and Change Order Approval tool. Agencies notify QAT when a 10% or greater change occurs via a letter and submission of the Contract Amendment and Change Order Approval. Neither the Framework Quick Reference, nor the guidance provided in the Contract Amendment and Change Order Approval Instructions, convey submission of a Contract Amendment and Change Order Approval deliverable to QAT – only conditions for agency head approval are addressed. Contract Amendment and Change Order Approval Instructions do not convey QAT approval of a contract amendment based on information in a submitted Contract Amendment and Change Order Approval deliverable.	2.0	Leg Budget Board for the Quality Assurance Team	Richard Corbell	Framework Other - Web, Contract Amendment and Change Order Approval, Framework Guidance	Minor	7/24/2008	Major	High	Recommend					2.1
45	The business problem is lack of clarity in a section of the Post-Implementation Review of Business Outcomes Instructions. Section 3.1.2 instructs to practitioners to describe and summarize what appears to be two separate topics. The desired outcome is to clarify the instructions and provide a consistent approach.	2.0	Department of Information Resources	Rose Wheeler	Post-Implementation Review of Business Outcomes	Minor	7/24/2008	Moderate	Medium	Recommend with modifications					2.1
44	The business problem is the Framework guidance does not clearly convey information regarding applicability of the Framework to major information resources projects, regardless of the funding source. The desired outcome is to ensure Framework guidance provides clear information.	1.9	Department of Information Resources	Rose Wheeler	Framework Other - Web, Framework Guidance	Minor						5/15/2008	Approve		2.0
43	The business problem is an inaccurate statement made within the Solicitation and Contracting Review Gate web page located at: <a href="http://www.dir.state.tx.us/pubs/framework/gate3/index.htm">http://www.dir.state.tx.us/pubs/framework/gate3/index.htm</a> which states that "A decision regarding procurement is made during the Project Planning Review Gate." Proposal - This statement should be removed.	1.7	Texas Health and Human Services Commission	Don McGrew	Framework Other - Web	Major	7/24/2008	Minor	Low	Recommend					2.1
42	The business problem is the instructions for section 1.1 of the Configuration Management Plan are unclear. The desired outcome is to clarify expected content of the section in order to provide guidance and examples to those who use the tool. The section is intended to request a graphical depiction of the how the project relates to the organizations that are responsible for configuration management for the project.	1.8	Department of Information Resources	Roslyn Hotard	Configuration Management Plan	Minor	1/30/2008	Minor	Low	Recommend					2.0
41	The business problem is Framework guidance and tools convey information that has become outdated due to recent external changes (e.g., retirement of the Internal Quality Assurance Guidelines, changes to the Information Resource Strategic Plan). The desired outcome is to ensure Framework guidance and tools reflect the most accurate and up-to-date information possible. DIR will complete an analysis to incorporate specific revisions based on recent changes.	1.8	Department of Information Resources	Rose Wheeler	Business Case, Framework Guidance, Risk Management Plan	Moderate						11/6/2007	Approve		1.9, 2.1
40	The business problem is sometimes agencies promote use of the Framework as filling in documents versus use of Framework tools to create project deliverables. These deliverables are used throughout the entire project life cycle, and not just for documenting project information as a one-time task. The desired outcome is to revise Framework guidance and tools as necessary to replace references to document with references to tool or deliverable.	1.7	Department of Information Resources	Rose Wheeler	Framework Guidance, Project Plan	Minor						9/21/2007	Approve		1.8, 2.0
39	No business problem exists. The desired Outcome is to revise Framework guidance to reflect the legislative change referenced in House Bill 3560 relating to transferring to the Comptroller of Public Accounts (CPA) the duties of TBPC that do not primarily concern state facilities. The agency name "TBPC" must be changed to "CPA."	1.7	Department of Information Resources	Roslyn Hotard	Framework Guidance, Post-Implementation Review of Business Outcomes, Performance Management Plan, Statewide Impact Analysis, Risk Management Plan, Review Gate Approval, Project Plan, Project Closeout, Framework Other - Web, Contract Amendment and Change Order Approval, Configuration Management Plan, Communication Management Plan, Business Case, Acceptance to Deploy, Acquisition Plan, Project Charter	Major						9/14/2007	Approve		1.8, 2.0

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38	The business goals for this change request are: 1. Easy for project manager to understand and navigate document and enter data. 2. Manageable to scale responses within sections. 3. Enable various options for sub-plans (e.g., communication, configuration). 4. Require few updates during project execution (i.e., low maintenance). 5. Support industry standards. 6. Follow uniform organization of information. 7. Eliminate redundancy. The revised template allows the user to reference a stand-alone document in some sections to allow more detail/emphasis on the information or to use an organization's standard template. See recommended changes tracked within the attached Project Plan.	1.7	TWC, HHSC, CPA	Leslie Howes, Don McGrew, Cindy Gray	Framework Guidance, Configuration Management Plan, Supplemental Tool - Project Plan, Performance Management Plan, Project Plan, Framework Other - Web, Risk Management Plan, Communication Management Plan	Major	1/30/2008	Major	High	Recommend					2.0, 2.1
37	No business problem exists. The desired outcome is to revise Framework guidance to reflect legislative changes adopted in the 80th Legislature Regular Session (2007). The following legislative changes must be incorporated based on an effective date of September 1, 2007: a) Business Case and Statewide Impact Analysis submission to QAT instead of LBB, SAO, and DIR. b) Framework applicability to major contracts in addition to major information resources projects. c) Project Plan submission to QAT and DIR instead of to QAT and TBPC (House Bill 3560)	1.6	Department of Information Resources	Rose Wheeler	Framework Other - Web, Project Plan, Framework Guidance, Acquisition Plan, Business Case, Statewide Impact Analysis	Moderate	7/11/2007	Moderate	High	Recommend		7/17/2007	Approve		1.7, 2.0
36	The business problems are the repetitive nature of Business Case content that is already described in other Framework guidance and tools, and the lack of clarity in key component of business case analysis. The desired outcome is to streamline and clarify guidance for the Business Case when possible. DIR will complete an analysis to incorporate specific revisions based on feedback provided in focus groups, correspondence, briefings, and other forums. In addition, specific revisions will be associated with future training objectives.	1.6	Department of Information Resources	Rose Wheeler	Business Case	Moderate	7/11/2007	Moderate	Medium	Recommend		7/17/2007	Approve		1.9
35	Combine the 4 sub-plans into the main project plan, combine redundant sections such as glossaries, and landscape selected tables in appendices to allow all information about a single item on one row.	1.6	Texas Workforce Commission	Leslie Howes	Configuration Management Plan, Communication Management Plan, Project Plan, Framework Guidance, Framework Other - Web, Risk Management Plan, Performance Management Plan	Major	7/11/2007			Reject		7/17/2007	Reject		NA
34	Beginning of each template: In item 4, provide direction about whether the abbreviated instructions are to be deleted. In item 5, it says to update page numbers only; however, the desired method still leaves incorrect page numbers	1.6	Texas Workforce Commission	Leslie Howes	Communication Management Plan, Monitoring Report, Risk Management Plan, Framework Other - Web, Supplemental Tool - Project Plan, Framework Extension - SDLC, Supplemental Tool - Risk Management Plan, Business Case, Contract Amendment and Change Order Approval, Project Plan, Framework Guidance, Review Gate Approval, Acceptance to Deploy, Performance Management Plan, Project Closeout, Project Charter, Post-Implementation Review of Business Outcomes, Acquisition Plan, Configuration Management Plan, Statewide Impact Analysis	Minor	7/11/2007	Minor	Low	Recommend		7/17/2007	Approve		1.7
33	Recommend making references to law and policy that supports the Framework a hyperlink for easy reference.	1.6	Texas Workforce Commission	Leslie Howes	Framework Guidance, Framework Other - Web	Minor	7/11/2007	Minor	Low	Recommend		7/17/2007	Approve		1.7
32	Business Case Workbook, Cost Analysis and Cost-Benefit Summary sheets 1. Separate one-time from recurring costs in the detail and the summary. 2. Provide an additional column for the one-time costs to include the corresponding amount for each item that is included in the project's Information Technology Detail (ITD) for the LAR and BOP.	1.6	Texas Workforce Commission	Leslie Howes	Business Case, Framework Guidance	Major	7/11/2007	Moderate	High	Recommend		7/17/2007	Approve		1.9
31	Risk Management Checklist asks if funding is set aside, suggesting its part of Management Reserve. Costs allocated to risk management are contingency reserves and part of the budget.	1.6	Texas Health and Human Services Commission	John C. Smith	Supplemental Tool - Risk Management Plan	Moderate	7/11/2007	Moderate	High	Recommend		7/17/2007	Approve		1.9
30	Supplemental Documents - consider adding a sign-off page to the supplemental documents.	1.6	Texas Health and Human Services Commission	John C. Smith	Supplemental Tool - Project Plan, Supplemental Tool - Risk Management Plan	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
29	1.3 Performance Objectives - Recommend swapping the order of 1.3 Performance Objectives with 1.2 Roles Definition. Completing the roles definition needs the performance objectives identified first for inclusion into the matrix.	1.6	Texas Health and Human Services Commission	John C. Smith	Performance Management Plan	Minor	7/11/2007	Moderate	Low	Recommend		7/17/2007	Approve		1.7
28	3.2.1 Risk Items and 3.2.2 Risk Status - An explanation of the available tools should be in a separate paragraph.	1.6	Texas Health and Human Services Commission	John C. Smith	Risk Management Plan	Moderate	7/11/2007	Moderate	High	Recommend		7/17/2007	Approve		1.9
27	3.4 Work Activities - Recommend developing the WBS and WBS Dictionary in a separate document and referencing here.	1.6	Texas Health and Human Services Commission	John C. Smith	Project Plan	Moderate	7/11/2007	Minor	High	Recommend		7/17/2007	Approve		1.7
26	3.3 Estimation Methods and Estimates - Recommend changing the estimate recommendation to be closer to a generally accepted (PMI) definitive range.	1.6	Texas Health and Human Services Commission	John C. Smith	Project Plan	Moderate	7/11/2007	Moderate	Low	Recommend		7/17/2007	Approve		1.7
25	2.2 External Interfaces. The table only provides columns for the organization name and the person. Provide a column for a description of the relationship or purpose of the organization.	1.6	Texas Health and Human Services Commission	John C. Smith	Project Plan	Moderate	7/11/2007	Moderate	High	Recommend		7/17/2007	Approve		1.7

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24	Recommend using a simple risk table with the possible headings of: Risk/Trigger/Mitigation while expanding the instructions.	1.6	Texas Health and Human Services Commission	John C. Smith	Monitoring Report	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
23	QAT - 2.1 Project Cost - Provide a space for Current Amount Encumbered.	1.6	Texas Health and Human Services Commission	John C. Smith	Monitoring Report	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
22	QAT Template - General Information - Consider adding a field for reporting frequency, e.g. quarterly, monthly, and add a field for the due date of the document.	1.6	Texas Health and Human Services Commission	John C. Smith	Monitoring Report	Minor	7/11/2007			Reject		7/17/2007	Reject		NA
21	QAT Monitoring Report - The cover sheet has a place for signatures. Add key stakeholder titles to the signature block.	1.6	Texas Health and Human Services Commission	John C. Smith	Monitoring Report	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
20	Introduction - Recommend providing a section delineating project objectives.	1.6	Texas Health and Human Services Commission	John C. Smith	Monitoring Report	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
19	Business Case Worksheet - Overall (section) - Require explanations for evaluation factor extremes with the ratings of both 1 or 5.	1.6	Texas Health and Human Services Commission	John C. Smith	Framework Other - Business Case Worksheet, Business Case	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
18	8.0 Revision History - Change the document title from "Name" to "Name of Preparer" or some other more descriptive heading.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Minor	7/11/2007			Reject		7/17/2007	Reject		NA
17	6.1 Methodology - Add the concept of prioritization to the project selection.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
16	5.4 Financial Analysis - The instructions do not map directly to the template. Develop a one-to-one correlation from the instructions to the template.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007	Moderate	Medium	Recommend		7/17/2007	Approve		1.9
15	5.1 Statutory Fulfillment - The table in the template does not suggest the level of detail shown in the instructions.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007	Moderate	Low	Recommend		7/17/2007	Approve		1.7
14	5. Project Evaluation - Indicate in the business case template and instructions this data is associated with the business case detailed data found in the worksheet.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007	Moderate	High	Recommend		7/17/2007	Approve		1.9
13	4.3 Performance Metrics - Redesign the table in the template to help develop metrics while providing more instructions in the template.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007	Moderate	Low	Recommend		7/17/2007	Approve		1.7
12	4.2 Goals and Objectives - Clarify instructions in the template - provide more detail while in the template while referring to the instruction section for good examples.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
11	3.3 Current Technology Environment - Add to the instructions - for example, when saying "provide brief description" define 'brief' and 'description' while providing examples for each of the areas in the template.	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007			Reject		7/17/2007	Reject		NA
10	2.2 Business Case Team Members. Create a more comprehensive table format which would drive completing the requisite information.	1.6	Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007	Moderate	Medium	Recommend		7/17/2007	Approve		1.7
9	The CAB Change Request Form - enable the spell checker allowing the development of correctly spelled documents	1.6	Texas Health and Human Services Commission	John C. Smith	Framework Other - CAB Change Request Form	Minor	7/11/2007			Reject		7/17/2007	Reject		NA
8	Business Case Template - Cost Analysis Tab (P14 Section) - Add Accessibility estimation cell (similar to Disaster Recovery).	1.6	Texas Health and Human Services Commission	John C. Smith	Business Case	Moderate	7/11/2007	Moderate	Medium	Recommend		7/17/2007	Approve		1.9
7	Project Plan Template - 5.2 Quality Standards: Recommend expanding section to include additional PM best practice standards.	1.6	Texas Health and Human Services Commission	John C. Smith	Communication Management Plan, Project Plan, Project Charter, Risk Management Plan, Acquisition Plan, Business Case	Minor	7/11/2007	Minor	Low	Recommend		7/17/2007	Approve		1.7
6	Remove the words "Framework Tool" from the Framework Quick Reference heading.	1.5	Department of Information Resources	Roslyn Hotard	Framework Guidance	Minor	4/9/2007	Minor	Low	Recommend		4/9/2007	Approve		1.6
5	Having a version and revision date on the Monitoring Report serves no purpose. Reporting period should be used instead	1.5	Texas Workforce Commission	Jeanette Bradfield	Monitoring Report	Minor	4/9/2007	Minor	Low	Recommend		4/9/2007	Approve		1.6
4	Revise the Version History introductory text in all Framework Instruction tools. Remove reference to "including a glossary." Change the word "document" to "tool", where applicable. Match text to text in SDLC tools	1.5	Department of Information Resources	Rose Wheeler	Contract Amendment and Change Order Approval, Risk Management Plan, Review Gate Approval, Business Case, Statewide Impact Analysis, Configuration Management Plan, Project Closeout, Project Charter, Project Plan, Acquisition Plan, Monitoring Report, Post-Implementation Review of Business Outcomes, Performance Management Plan, Communication Management Plan, Acceptance to Deploy	Minor	4/9/2007	Minor	Low	Recommend		4/9/2007	Approve		1.6
3	Identify statutory references in the Submission Requirements Timeline Description for project approval and other similar activities	1.5	Texas Department of Transportation	Karen Van Hooser	Test Plan	Minor	4/9/2007	Minor	Low	Recommend		4/9/2007	Approve		1.6
2	Indicate in the Framework Quick Reference that the Acquisition Plan is referenced in status as the Procurement Plan.	1.5	Texas Department of Transportation	Karen Van Hooser	Framework Guidance	Minor	4/9/2007	Minor	Low	Recommend		4/9/2007	Approve		1.6
1	Have a one click button to download all the Framework tools - handbook, instructions, templates, worksheets and examples.	1.5	Texas Health and Human Services Commission	Sherri Conner	Business Case, Framework Other - Web	Minor	4/9/2007	Minor	Low	Reject		4/9/2007	Reject		NA